

Individual retail investors (as defined in the Corporations Act 2001 S761G) should complete this form to enable Bell Potter Capital to assess the borrowers request for a credit limit on a new or exiting facility as required by the Corporations Act 2001.

Credit Limit Request

GROSS ANNUAL INCOME DETAILS	Applicant 1	Applicant 2
Base Salary/Income		
Other Income (bonuses, overtime etc.)		
Investment Income		
<b>Total</b>		

*Please provide us with evidence of your annual income to enable us to verify your information.*

MONTHLY FINANCIAL COMMITMENTS	Applicant 1	Applicant 2
Home Loan Repayments/Rent		
Investment Loan Repayments		
Other Financial Commitments		
Living and other Expenses		
<b>Total</b>		

*Joint Applicants may combine*

ASSETS	Applicant 1	Applicant 2
Value of Home		
Other Real Estate Owned		
Other Investment Assets (excluding Superannuation)		
Cash		
<b>Total</b>		

*Joint Applicants may combine*

LIABILITIES	Applicant 1	Applicant 2
Loan against Home		
Other Real Estate Loans		
Other Investment Loans		
Other Loans		
Credit Card Debt		
<b>Total</b>		

*Joint Applicants may combine*

DETAILS OF SECURITY YOU WILL CONTRIBUTE FOR YOUR PORTFOLIO LOAN

Cash \$

Shares \$

Do you have an existing loan that was used to fund any of this security?

 Yes No

(If yes please provide details)

Was the loan secured against your home?

 Yes No

(If yes, please provide details)

PLEASE SIGN HERE

Applicant 1

Signature

Date

Applicant 2

Signature

Date

Direct Margin Lending is issued by Bell Potter Capital Limited  
ABN 54 085 797 735 and AFS Licence No 360457

> **Attention:** **New Accounts**  
Fax to: +613 8663 2799  
Post to: Bell Direct  
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Sydney NSW 2001  
Email to: support@belldirect.com.au